

MONTANA PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION

100 North Park Avenue, Suite 200 ~ PO BOX 200131

HELENA MT 59620-0131

(406) 444-3154 or (877) 275-7372

**WITHHOLDING CERTIFICATE**

Please print or type

Name _____

Address _____ Social Security No. _____ - _____ - _____

(For tax purposes 26 USC §6401A and 6109)

City, State & Zip _____ Telephone No. _____

☐ Check here if this is a change of address.**Federal income tax withholding - choose one of the following options**

<input type="checkbox"/>	1	Withhold the following amount from my monthly benefit.	\$	
		Begin deductions on		
<input type="checkbox"/>	2	Withhold federal income tax based on marital status and the number of exemptions I specified.	Married	
			Single	
		Begin deductions on _____	Married but use single rate	
			Number of exemptions	
			Plus an additional amount	\$
<input type="checkbox"/>	3	Do not withhold federal tax from my monthly benefit.		

Montana state income tax withholding - choose one of the following options

<input type="checkbox"/>	1	Withhold the following amount from my monthly benefit.	\$	
		Begin deductions on		
<input type="checkbox"/>	2	Withhold Montana state income tax based on the number of exemptions I specified.	Number of exemptions	
		Begin deductions on _____	Plus an additional amount	\$
<input type="checkbox"/>	3	Do not withhold Montana tax from my monthly benefit.		

Signature _____ Date _____

MPERA USE ONLY

Retirement No. _____

Date processed _____

Examples of Deductions for both Federal & State Withholding

Example A Choosing a specific amount to be withheld

Federal income tax withholding: choose one of the following options													
<input checked="" type="checkbox"/>	1	Withhold the following amount from my monthly benefit.	\$ 100.00										
		Begin deduction on	September 1, 2000										
	2	Withhold federal income tax based on marital status and the number of exemptions I specified.	<table border="1"> <tr> <td>Married</td> <td></td> </tr> <tr> <td>Single</td> <td></td> </tr> <tr> <td>Married but use single rate</td> <td></td> </tr> <tr> <td>Number of exemptions</td> <td></td> </tr> <tr> <td>Plus an additional amount</td> <td>\$</td> </tr> </table>	Married		Single		Married but use single rate		Number of exemptions		Plus an additional amount	\$
Married													
Single													
Married but use single rate													
Number of exemptions													
Plus an additional amount	\$												
		Begin deductions on _____											
	3	Do not withhold federal tax from my monthly benefit.											

Example B Using the tax tables provided by the IRS & Dept of Revenue

Federal income tax withholding: choose one of the following options													
	1	Withhold the following amount from my monthly benefit.	\$										
		Begin deductions on											
<input checked="" type="checkbox"/>	2	Withhold federal income tax based on marital status and the number of exemptions I specified.	<table border="1"> <tr> <td>Married</td> <td>X</td> </tr> <tr> <td>Single</td> <td></td> </tr> <tr> <td>Married but use single rate</td> <td></td> </tr> <tr> <td>Number of exemptions</td> <td>2</td> </tr> <tr> <td>Plus an additional amount (In addition to tax table deductions)</td> <td>\$</td> </tr> </table>	Married	X	Single		Married but use single rate		Number of exemptions	2	Plus an additional amount (In addition to tax table deductions)	\$
Married	X												
Single													
Married but use single rate													
Number of exemptions	2												
Plus an additional amount (In addition to tax table deductions)	\$												
		Begin deductions on _____ (If no date is provided, we will process on next available payroll.)											
	3	Do not withhold federal tax from my monthly benefit.											

Example C Canceling deductions or choosing no deductions

Federal income tax withholding: choose one of the following options													
	1	Withhold the following amount from my monthly benefit.	\$										
		Begin deductions on											
	2	Withhold federal income tax based on marital status and the number of exemptions I specified.	<table border="1"> <tr> <td>Married</td> <td></td> </tr> <tr> <td>Single</td> <td></td> </tr> <tr> <td>Married but use single rate</td> <td></td> </tr> <tr> <td>Number of exemptions</td> <td></td> </tr> <tr> <td>Plus an additional amount</td> <td>\$</td> </tr> </table>	Married		Single		Married but use single rate		Number of exemptions		Plus an additional amount	\$
Married													
Single													
Married but use single rate													
Number of exemptions													
Plus an additional amount	\$												
		Begin deductions on _____											
<input checked="" type="checkbox"/>	3	Do not withhold federal tax from my monthly benefit.											